



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 1, 2019

JOHN HEILNER

CHIEF INVESTMENT OFFICER

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

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Address: 7161 E. Rancho Vista Drive, Suite 112
Scottsdale, AZ 85251

This brochure supplement provides information about John Heilner, Chief Investment Officer and Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. John Heilner’s CRD number is 2431461.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **John Heilner**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 2431461

Year of Birth: 1966

Educational Background

Central CT State University (1989 - 1993)

BS in Finance

Northeastern University (1984-1988)

BS in Economics

Business Experience

Chief Investment Officer (Mar. 2013 - Present)

WT Wealth Management, LLC

Chief Compliance Officer (Mar. 2013- May 2018)

WT Wealth Management, LLC

Registered Representative (Apr. 2015 - Feb. 2016)

Purshe Kaplan Sterling Investments

Portfolio Manager (registered) (May 2012 - Apr. 2013)

Palo Verde Capital

Economist (unregistered) (Mar. 2011 - May 2012)

Palo Verde Capital

President (Feb. 2008 - Mar. 2011)

Renegade Classics

Mutual Fund Strategist

(Jul. 2000 – Feb. 2008)

ING Mutual Funds

ITEM 3 DISCIPLINARY INFORMATION

None. John Heilner does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

John Heilner is the Manager of WT Tax Accounting, LLC. He spends approximately two (2) hours per month signing checks and performing payroll activities. John Heilner also maintains his license to sell insurance, though he is not actively pursuing insurance business. He spends less than two (2) hours per month maintaining his license. WT Tax Accounting, LLC does not have a signatory authority for any client of WTWM's or for WTWM itself as an entity.

ITEM 5 ADDITIONAL COMPENSATION

John Heilner does not receive any economic benefit from any third party for providing advisory services.

ITEM 6 SUPERVISION

John Heilner is the Chief Investment Officer and an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



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ROBERT F. REDWANC

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

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Address: 7161 E. Rancho Vista Drive, Suite 112
Scottsdale, AZ 85251

This brochure supplement provides information about Robert F. Redwanc, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique

identifying number known as a CRD number. Robert F. Redwanc's CRD number is 4354455.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Robert F. Redwanc**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 4354455

Year of Birth: 1956

Educational Background

Academy of CFDS- currently a student

Business Experience:

Investment Advisor Representative WT Wealth Management, LLC	Dec. 2015 – Present
Member, Owner, Vice President, Registered Investment Advisor (registered) True Financial Wealth Management Firm, LLC fka True Financial Advisory Firm, LLC	Mar. 2013 – Present
Investment Advisor Representative Financial Advisors of America, LLC	Jan. 2008 – Apr. 2013
Member, Owner, Vice President (unregistered) True Financial Wealth Management Firm, LLC fka True Financial Advisory Firm, LLC	Oct. 2002 – Mar. 2013
Investment Advisor Representative Girard Securities, Inc.	Mar. 2005 – Jan. 2008
Registered Representative Girard Securities, Inc.	Sept. 2002 – Jan. 2008
Registered Representative Sentra Securities Corporation	Mar. 2002 – Nov. 2002

ITEM 3 DISCIPLINARY INFORMATION

None. Robert F. Redwanc does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Robert F. Redwanc is dually registered as an investment advisor representative with True Financial Wealth Management Firm, LLC. He spends approximately five (5) hours per month providing investment advisory services to clients. Dual registration may pose a conflict of interest based on compensation received rather than client needs. Robert F. Redwanc and WTWM are committed to acting in the client's best interest. Any compensation is fully disclosed, in advance, to the client.

ITEM 5 ADDITIONAL COMPENSATION

Robert F. Redwanc is dually registered as an investment advisor representative with True Financial Wealth Management Firm, LLC and receives compensation for advisory services rendered through that firm.

ITEM 6 SUPERVISION

Robert F. Redwanc is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



WEALTHMANAGEMENT

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EILEEN M. PROUD

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

Email: eproud@wtwealthmanagement.com

Address: 7161 E. Rancho Vista Drive, Suite 112
Scottsdale, AZ 85251

This brochure supplement provides information about Eileen M. Proud, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Eileen M. Proud’s CRD number is 1019703.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Eileen M. Proud**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 1019703

Year of Birth: 1954

Educational Background

Kaplan University	(2017)
Wealth Management Specialist	
Academy of Certified Financial Divorce Specialists	(2016)
Earned CFDS designation	
Institute of Certified Divorce Financial Analysts	(2016)
Earned CDFA designation	
College of Financial Planning	(1984 - 2004)
Earned CFP designation	
<i>*CFP license is no longer active.*</i>	

Business Experience

Investment Advisor Representative WT Wealth Management, LLC	Dec. 2015 - Present
Member, Owner, President True Financial Wealth Management Firm, LLC fka True Financial Advisory Firm, LLC	May 2006 - Present
Registered Representative, Investment Advisor Representative Financial Advisors of America, LLC	Jan. 2008 - Apr. 2013

**Registered Representative, Investment Advisor
Representative**

Girard Securities, Inc.

Sept. 2002 – Jan. 2008

**Registered Representative, Investment Advisor
Representative**

Sentra Securities Corporation

Jul. 1985 – Sept. 2002

Designation Descriptions

CDFA: The Certified Divorce Financial Analyst™ (CDFA™) designation is available to individuals who have a minimum of two years' experience as a financial professional, accountant, or matrimonial lawyer. To earn the designation, the participant must complete a series of self-study course modules and pass an exam for each module.

In the USA, this training qualifies for 32 hours of continuing education for the CFP® Board of Standards, 25 CPE credits for the CPA designation, and 32 PACE credits for ChFCs and CLUs. To retain the Certified Divorce Financial Analyst™ designation, a CDFA™ must obtain 20 hours of Continuing Education (CE) every two years (ten of which must be divorce-related), remain in good standing with the IDFA™, and keep his/her dues current.

CFDS: The Certified Financial Divorce Specialist® (CFDS®) designation signifies that a certificant has attained comprehensive knowledge of the following subject matter:

- Divorce - A Historical Perspective
- The Financial Affidavit
- Debt, Credit, & Bankruptcy
- Retirement/Pension Plans
- Social Security & Medicare
- Qualified Domestic Relations Orders (QDROs)
- Alimony & Related Issues
- Child Support & Related Issues
- Dividing the House 4
- Dividing the Property
- Divorce Tax Issues
- Legal Issues
- Mediation, An Alternative
- Collaborative Divorce
- Malpractice Issues
- Expert Witnesses
- Forensic Accounting
- Marketing
- Code of Ethics

The CFDS® designation is a self-study program that includes one 500+ page binder covering the subject matter above and Family Law Software program. This software assists

in determining financial results when calculating "what if" scenarios such as: who keeps the house, who receives the 401(k), who assumes the visa card balance, etc.

To earn the designation, candidates must successfully complete one case study (submitted via email for grading) plus one online test within a one-year period of time.

ITEM 3 DISCIPLINARY INFORMATION

None. Eileen M. Proud does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Eileen M. Proud is dually registered as an investment advisor representative with True Financial Wealth Management Firm, LLC. She spends approximately five (5) hours per month providing investment advisory services to clients. Dual registration may pose a conflict of interest based on compensation received rather than client needs. Eileen M. Proud and WTWM are committed to acting in the client's best interest. Any compensation is fully disclosed, in advance, to the client.

Eileen M. Proud also maintains her license to sell insurance, though she is not actively pursuing insurance business. She spends less than two (2) hours per month maintaining her license.

Though Eileen M. Proud has earned the CFP designation, she has allowed her license to lapse and it is no longer active.

ITEM 5 ADDITIONAL COMPENSATION

Eileen M. Proud is dually registered as an investment advisor representative with True Financial Wealth Management Firm, LLC and receives compensation for advisory services rendered through that firm.

ITEM 6 SUPERVISION

Eileen M. Proud is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



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ALLEN ATKINS, PH.D.

CHIEF MARKET STRATEGIST,
INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: aatkins@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Dr. Allen Atkins, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Dr. Atkins’ CRD number is 6239393.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Dr. Allen Atkins**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6239393

Year of Birth: 1951

Educational Background

University of Texas at Austin (1988)
Earned PhD

Stephen F. Austin State University (1982)
Earned MBA

Dartmouth College (1973)
Earned BA

Business Experience

Chief Market Strategist Jan. 2018 – Present
WT Wealth Management, LLC

Chief Market Strategist/Member Oct. 2012 – Mar. 2018
Four Peaks Wealth Management, LLC

Professor of Finance Apr. 2007 – Present
Northern Arizona University

Member Feb. 2017 – Nov. 2017
Four Peaks Wealth Sedona, LLC

Assistant Professor of Finance Aug. 1988 – Mar. 2007
University of Arizona

Associate Director, Karl Eller Center Berger Entrepreneurship Program, University of Arizona	Jul. 1995 – Jul. 1998
Visiting Senior Lecturer in Finance University of Auckland (Auckland, New Zealand)	May 1993 – Aug. 1993
Assistant Instructor of Finance University of Texas	Jan. 1980 – May 1984
Assistant Instructor of Management and Marketing Stephen F. Austin State University	Jan. 1983 – May 1983
Income Tax Consultant Barnett’s Tax Service	Jan. 1978 – May 1979

ITEM 3 DISCIPLINARY INFORMATION

None. Dr. Atkins does not have any legal or disciplinary events material to a client’s or prospective client’s evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Dr. Atkins serves as a finance professor for Northern Arizona University. Dr. Atkins may spend as much as 80% of his time with his other business activity.

ITEM 5 ADDITIONAL COMPENSATION

Dr. Atkins receives a salary as a finance professor with Northern Arizona University.

ITEM 6 SUPERVISION

Dr. Allen Atkins is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM’s Chief Compliance Officer and is primarily responsible for implementation of the Firm’s policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



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RONALD GETTO

SENIOR INVESTMENT ADVISOR

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: rgetto@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Ronald Getto, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Getto’s CRD number is 1558084.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Ronald Getto**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 1558084

Year of Birth: 1961

Educational Background

Columbia Business School (1986)
Earned MBA

Columbia University (1984)
Earned BA

Business Experience

Senior Investment Advisor Jan. 2018 – Present
WT Wealth Management, LLC

Chief Financial Officer/Member Aug. 2017 – Mar. 2018
Four Peaks Wealth Management, LLC

Member Feb. 2017 – Nov. 2017
Four Peaks Wealth Sedona, LLC

Proprietor Dec. 2010 – Present
Starlite Lanes

CFO and COO Dec. 2006 – Dec. 2008
Cantor Advisors

Chief Sales Officer Mar. 2004 – Dec. 2006
Cantor Fitzgerald

General Partner Feb. 2001 – Feb. 2004
Digital Projection Partners

Senior Vice President
Donaldson, Lufkin & Jenrette

Aug. 1986 – Dec. 2000

ITEM 3 DISCIPLINARY INFORMATION

None. Mr. Getto does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Getto is the owner of Starlite Lanes, a bowling alley, and he may spend as much as 80% of his time with this other business activity.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Getto receives compensation as the owner of Starlite Lanes. However, this is a non-financial services related enterprise.

ITEM 6 SUPERVISION

Mr. Getto is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



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MATTHEW HAERTZEN, CFA

SENIOR INVESTMENT ADVISOR

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: mhaertzen@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Matthew Haertzen, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Haertzen’s CRD number is 2405742.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Matthew Haertzen**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 2405742

Year of Birth: 1971

Educational Background

University of Minnesota, Carlson School of Management (1994)

Earned MBA

University of Minnesota, Morris (1993)

Earned BA

Mr. Haertzen is a Chartered Financial Analyst (CFA). Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. CFA certification requirements are:

- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience.
- Successful completion of all three exam levels of the CFA Program.
- Have 48 months of acceptable professional work experience in the investment decision making process.
- Fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.
- Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

Business Experience

Senior Investment Advisor

WT Wealth Management, LLC

Jan. 2018 – Present

Lecturer of Finance Eller College of Management, University of Arizona	Jun. 2017 – Present
Chief Executive Officer/Member Four Peaks Wealth Management, LLC	Oct. 2012 – Mar. 2018
Consultant Georgia Biofuels	Sep. 2011 – Dec. 2017
Managing Member Four Peaks Wealth Sedona, LLC	Feb. 2017 – Nov. 2017
Finance Professor Northern Arizona University	Aug. 2008 – May 2017
Consultant/Portfolio Manager CP Cogent Securities, LP	Aug. 2006 – Apr. 2013
Instructor Western Wyoming Community College	Aug. 2006 – May 2008
Chief Investment Officer CP Cogent Securities, LP	Jun. 2005 – Aug. 2006
Chief Investment Officer Idaho State Endowment Fund	Jan. 2003 – May 2005
Equity Portfolio Manager Washington Trust Bank	Mar. 2001 – Dec. 2002
Assistant Director Office of Asset Management, University of Minnesota	Mar. 1999 – Mar. 2001
Manager, Structured Products Quantitative Support American Express Financial Advisors	Apr. 1994 – Mar. 1999

ITEM 3 DISCIPLINARY INFORMATION

None. Mr. Haertzen does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Haertzen serves as a Lecturer of Finance for the Eller College of Management at the University of Arizona. Mr. Haertzen may spend as much as 80% of his time with this other business activity.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Haertzen receives a salary as a Lecturer of Finance for the Eller College of Management at the University of Arizona.

ITEM 6 SUPERVISION

Mr. Haertzen is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



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RYAN STUART, CFA

Business Director

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: rstuart@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Ryan Stuart, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Stuart’s CRD number is 6639504.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Ryan Stuart**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6639504

Year of Birth: 1988

Educational Background

University of Colorado at Boulder, (2010)
Leeds School of Business

Earned BA

Mr. Stuart is a Chartered Financial Analyst (CFA). Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. CFA certification requirements are:

- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience.
- Successful completion of all three exam levels of the CFA Program.
- Have 48 months of acceptable professional work experience in the investment decision making process.
- Fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.
- Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

Business Experience

Business Director Jan. 2018 – Present
WT Wealth Management, LLC

Director Jan. 2017 – Nov. 2017
Four Peaks Wealth Sedona, LLC

Director of Private Equity Investments/Member Four Peaks Wealth Management, LLC	Apr. 2016 – Mar. 2018
Manager of Global Transfer Pricing Services KPMG Australia	Jan. 2014 – Dec. 2015
Sr. Associate of Economic & Valuation Services KPMG, LLP	Jun. 2009 – Jul. 2013

ITEM 3 DISCIPLINARY INFORMATION

None. Mr. Stuart does not have any legal or disciplinary events material to a client’s or prospective client’s evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

From time to time, Mr. Stuart provides business and investment valuation consulting services for parent company Western Trust and clients of affiliate WT Tax Accounting, Mr. Stuart spends approximately 1% of his time on this activity.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Stuart receives compensation for his consulting services with Western Trust and WT Tax Accounting.

ITEM 6 SUPERVISION

Mr. Stuart is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM’s Chief Compliance Officer and is primarily responsible for implementation of the Firm’s policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



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EMY TICE, CFP

CERTIFIED FINANCIAL PLANNER

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: etice@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Emy Tice, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mrs. Tice’s CRD number is 6499262.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Emy Tice**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6499262

Year of Birth: 1969

Educational Background

University of Georgia, Terry College of Business (2014)
Certificate in Financial Planning

Northern Arizona University (1994)
MBA

Northern Arizona University (1993)
Earned BSBA Finance

Mrs. Tice is a Certified Financial Planner. The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services,

and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Experience

**Certified Financial Planner,
Investment Adviser Representative**
WT Wealth Management, LLC

Jan. 2018 – Present

Certified Financial Planner
Four Peaks Wealth Management, LLC

May. 2015 – Dec. 2017

Lecturer of Finance
Northern Arizona University, W.A. Franke College of Business

Aug. 2011 – Present

General Manager Jan. 2003 – Aug. 2011
Boyer Heating and Cooling

Business Manager Mar. 1995 – Jan. 2003
Boyer Heating and Cooling

Part-Time Instructor of Business Jan. 1995 to May 2011
Northern Arizona University, W.A. Franke College of Business

ITEM 3 DISCIPLINARY INFORMATION

None. Mrs. Tice does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Mrs. Tice serves as a Lecturer of Finance for Northern Arizona University. Mrs. Tice may spend as much as 80% of her time with this other business activity.

ITEM 5 ADDITIONAL COMPENSATION

Mrs. Tice receives a salary as a Lecturer for Northern Arizona University.

ITEM 6 SUPERVISION

Mrs. Tice is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 1, 2019

GLENN LEEST

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: gleest@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Glenn Leest, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Leest’s CRD number is 6234623.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Glenn Leest**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6234623

Year of Birth: 1985

Educational Background

Coconino Community College (2013)
Earned an Associate Degree

Business Experience

Investment Adviser Representative Jan. 2018 – Present
WT Wealth Management, LLC

Investment Adviser Representative May 2015 – Dec. 2017
Four Peaks Wealth Management, LLC

Registered Representative and Insurance Agent Jun. 2013 – May 2015
Spence Cassidy and Associates, LLC

ITEM 3 DISCIPLINARY INFORMATION

None. Mr. Leest does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Leest does not engage in any outside business activities.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Leest does not receive any additional compensation.

ITEM 6 SUPERVISION

Mr. Leest is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 1, 2019

JACOB BILIACK

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: jbiliack@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Jacob Biliack, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Biliack’s CRD number is 6581939.

ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Jacob Biliack**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6581939

Year of Birth: 1992

Educational Background

Northern Arizona University (2015)
Earned BA

Business Experience

Investment Adviser Representative Jan. 2018 – Present
WT Wealth Management, LLC

Investment Adviser Representative Jul. 2017 – Dec. 2017
Four Peaks Wealth Management, LLC

Investment Adviser Representative Apr. 2016 – May 2017
AXA Advisors LLC

ITEM 3 DISCIPLINARY INFORMATION

None. Mr. Biliack does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Biliack is involved in the following other business activities for which he is compensated:

- Operates a vacation rental management business, and
- Firefighter with the Madison Fire Department (Wisconsin).

Mr. Biliack spends approximately 90% of his time on these other business activities.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Biliack receives a salary as a firefighter and for managing vacation rentals.

ITEM 6 SUPERVISION

Mr. Biliack is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 1, 2019

DANIEL GOODMAN

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: dgoodman@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Daniel Goodman, Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Goodman’s CRD number is 6797466.

ITEM 1 BACKGROUND

A. General Requirements

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. Investment Adviser Representative Information

We currently have eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Daniel Goodman**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6797466

Year of Birth: 1992

Educational Background

Northern Arizona University (2018)

BS Degrees in Finance and Economics from W.A. Franke College of Business

Pima College (2016)

Earned Associate of Science degree in Business Administration

Business Experience

Analyst / Investment Adviser Representative May 2018 - Present

WT Wealth Management, LLC

Student Aug. 2016 - May 2018

Northern Arizona University- W.A. Franke College of Business

Intern Apr. 2016 - May 2018

Northwestern Mutual

Student Jan. 2014 - Dec. 2016

Pima College

ITEM 3 DISCIPLINARY INFORMATION

None. Mr. Goodman does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Goodman does not engage in any outside business activities.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Goodman does not receive any additional compensation.

ITEM 6 SUPERVISION

Mr. Goodman is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.